



Agenda Template



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Objective - Why are we here today?

The purpose of our meeting today is to agree whether we ____
(*can help you with ____ / are the right fit for ____*)

Time - Confirm the duration

On the phone, we provisionally agreed for 1 hour. Is that still ok for you? Just in case our conversation overruns, if we need an extra 10 mins, do you have it?

Agenda – what is important to them?

So that we make the most of our time together today, what would you like to make sure we cover?

Agenda – what is important to me?

So that I can see whether I'm a good fit for you, I would like to ask you some questions in order to get a good feel for your current situation. Would that be ok?

Outcome - What should we try to decide by the end of the meeting?

By the end of this meeting, I would like us to mutually agree on whether we feel we are a good fit for each other.